

Barnwell County Base Labor Market Analysis



South Carolina
Department of
Commerce
Labor Market Information



November 2008

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EXECUTIVE SUMMARY

Population

Barnwell County's population has declined in recent years.

The population is projected to grow more slowly than the state's.

Over a third of Barnwell County's workers come from Aiken County.

About one quarter live in Barnwell County.

Income

Per capita income growth has been slower than in the state and the nation.

Barnwell County's per capita income, after rising above state levels in 1998 and 1999, has fallen increasingly behind the state.

Barnwell County's average wages are higher than the state's for the legal occupational group.

Education

The number of degrees awarded by area post-secondary institutions has increased.

The greatest increase has been in the area of healthcare.

Occupations

The following occupational groups are expected to have faster growth in Barnwell County than in the state:

Computer and mathematical science, personal care and service, and farming and forestry.

Requirements for Barnwell County's workers are expected to grow in the following levels of education and experience:

Short-term on-the-job training, work experience in a related field, postsecondary vocational award, and bachelor's degree.

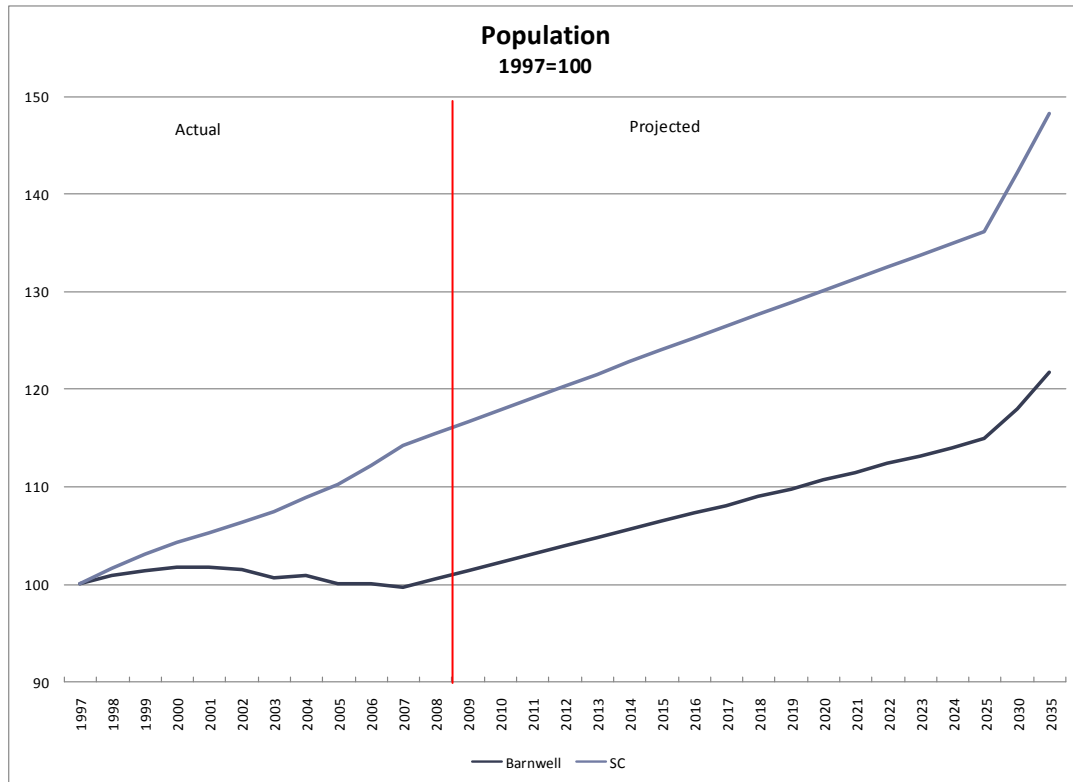
Industry

Based on available data, a sector rated as having potential in Barnwell County is forestry and logging.

POPULATION

Growth

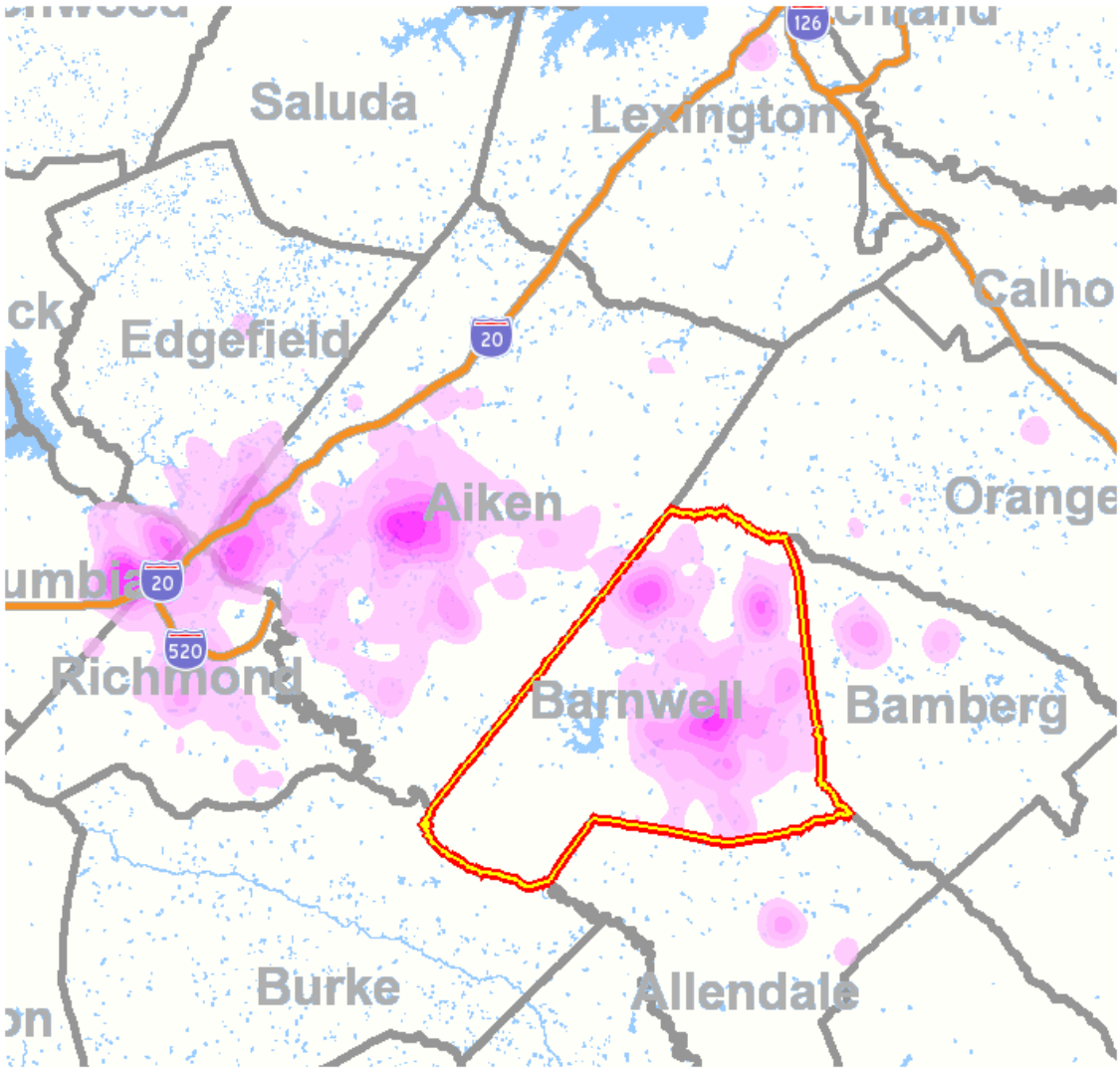
Barnwell County's 2007 population was 22,975. The county population has fallen by 0.3% since 1997, compared to 14.2% growth for South Carolina. Barnwell's population is expected to grow more slowly than the state's.



Source: U.S. Census Bureau (estimates) and SC Budget & Control Board/Office of Research and Statistics (projections).

LABORSHED

The map below shows where Barnwell County workers come from (in 2006, latest available data). Barnwell County draws over a third of its workers from Aiken County, with about one quarter living in Barnwell County.



Source: U.S. Census Bureau, Local Employment Dynamics.

Characteristics of Workers

<u>Age of Workers:</u>		<u>Earnings of Workers:</u>	
30 or younger	10.4%	\$1,200 per month or less	11.1%
31 to 54	70.4%	\$1,201 to \$3,400 per month	25.0%
55 or older	19.2%	More than \$3,400 per month	63.9%

States Where Workers Live:

South Carolina	77.8%
Georgia	21.8%
All other locations	0.4%

Counties Where Workers Live:

Aiken	36.6%
Barnwell	24.2%
Columbia (Georgia)	11.2%
Richmond (Georgia)	9.5%
Bamberg	3.0%
Edgefield	3.0%
Orangeburg	2.7%
Allendale	1.7%
Lexington	1.2%
Berkeley	0.8%
All Other Locations	6.2%

Cities Where Workers Live:

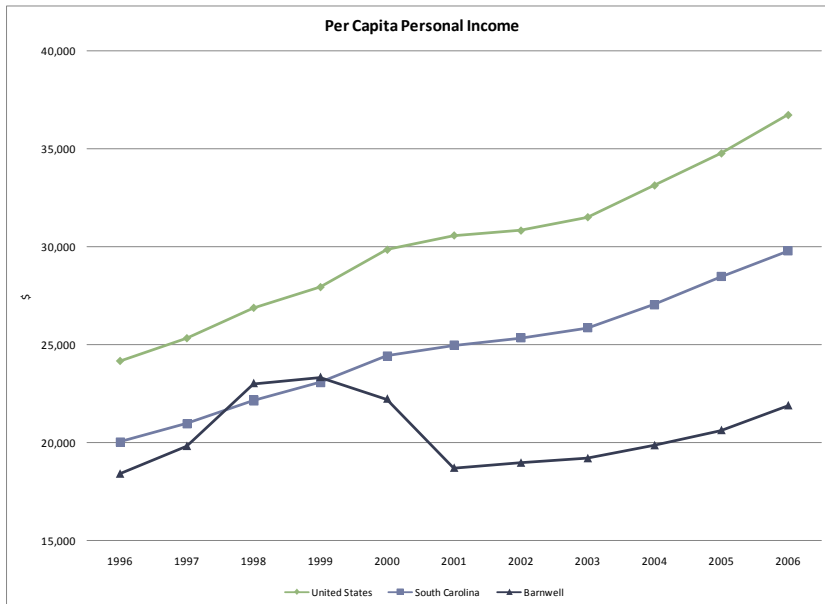
Augusta-Richmond County (balance), Georgia	9.2%
Aiken, South Carolina	8.8%
Martinez, Georgia	6.3%
Barnwell, South Carolina	5.4%
North Augusta, South Carolina	5.1%
Williston, South Carolina	3.5%
Evans, Georgia	3.4%
Blackville, South Carolina	2.3%
Belvedere, South Carolina	1.3%
New Ellenton, South Carolina	0.9%
All Other Locations	53.8%

Source: U.S. Census Bureau, Local Employment Dynamics.

INCOME

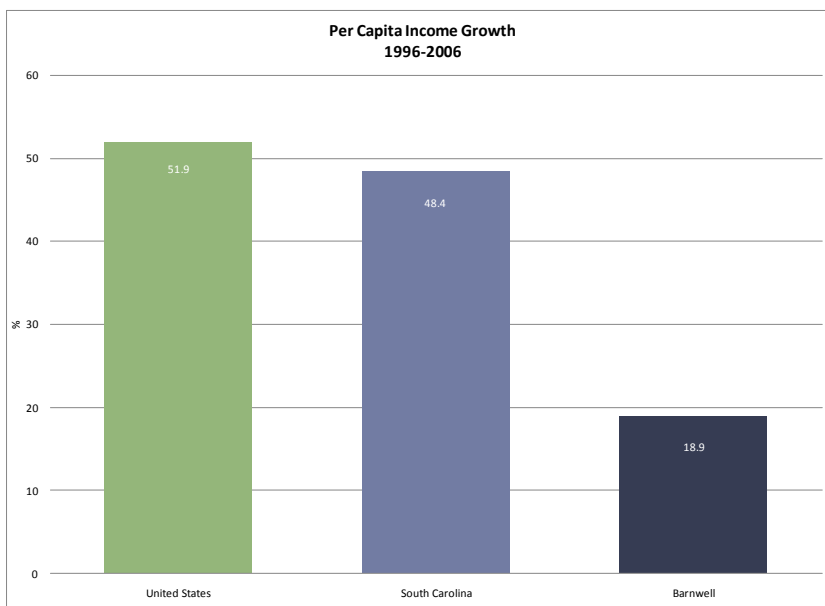
Per Capita Income

After rising above state levels in 1998 and 1999, Barnwell County's per capita income has fallen increasingly behind state and national levels.



Source: U.S. Department of Commerce, Bureau of Economic Analysis.

Barnwell County's per capita income has grown much slower than South Carolina's and the nation's. Personal income growth was well below average.



Source: U.S. Department of Commerce, Bureau of Economic Analysis.

Wages by Industry

Barnwell County's average wages are well below those of South Carolina (\$565 vs. \$680 in 2007). Average wages were down 15% in Barnwell County over the past five years, compared to an 18% increase for the state. All major sectors for which data was available, except waste management and other services, had growth.

Industry	NAICS Code	2007 Average Weekly Wage (\$)	2002 Average Weekly Wage (\$)	% Change
Total, Private and Government		565	667	-15
Construction	23	610	445	37
Manufacturing	31-33	669	567	18
Retail Trade	44-45	359	315	14
Transportation and Warehousing	48-49	NA	480	
Information	51	1,272	803	58
Finance and Insurance	52	680	525	30
Real Estate and Rental and Leasing	53	319	264	21
Administration & Support & Waste Management & Remediation Services	56	626	693	-10
Arts, Entertainment, and Recreation	71	244	204	20
Accommodation and Food Services	72	189	168	13
Other Services (Except Public Administration)	81	296	308	-4
Federal Government		804	705	14
State Government		640	593	8
Local Government		532	460	16

Source: U.S. Department of Labor, Bureau of Labor Statistics, Quarterly Census of Employment and Wages.

Wages by Occupation

Average wages in Barnwell County are higher than the state average in the legal occupational group.

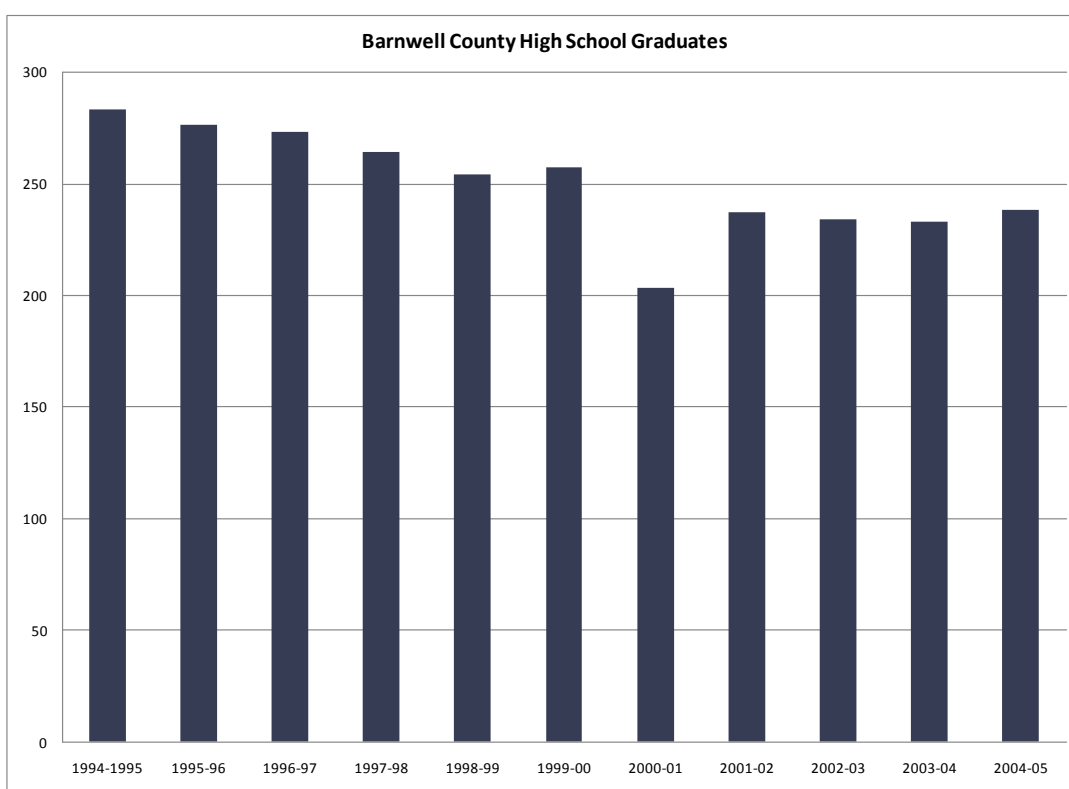
Occupation	2007 Barnwell County Median Hourly Wage (\$)	2007 SC Median Hourly Wage (\$)
Management occupations	13.98	28.78
Business and financial operations occupations	15.16	20.28
Computer and mathematical science occupations	17.38	26.20
Architecture and engineering occupations	18.49	30.22
Life, physical and social science occupations	15.49	22.76
Community and social services occupations	11.72	13.18
Legal occupations	30.92	30.68
Education, training and library occupations	19.03	24.42
Arts, design, entertainment, sports and media occupations	9.54	12.66
Healthcare practitioners and technical occupations	20.73	30.64
Healthcare support occupations	9.02	10.55
Protective service occupations	12.91	13.87
Food preparation and serving related occupations	6.95	7.90
Building and grounds cleaning and maintenance occupations	7.42	8.42
Personal care and service occupations	7.04	8.39
Sales and related occupations	8.37	13.48
Office and administrative support occupations	11.25	13.22
Farming, fishing, and forestry occupations	8.57	13.07
Construction and extraction occupations	10.97	16.51
Installation, maintenance and repair occupations	14.12	16.88
Production occupations	12.09	15.21
Transportation and material moving occupations	8.72	12.94

Source: Economic Modeling Specialists, Inc.

EDUCATION

High School Graduates

From 1995 to 2005 (latest data available), the number of Barnwell County students receiving high school diplomas fell by 45 (16%). In South Carolina, on the other hand, the number of high school diplomas increased 9% from 1995 to 2005. A total of 238 people received high school diplomas in Barnwell County in 2005. Barnwell County had 41 fewer 12th grade students in 2004-05 than in 1994-95. Also, the number of Barnwell County students not passing the exit exam who received a certificate of completion instead of a diploma was up by 11 (to 19) over the 1995-2005 period.



Source: National Center for Education Statistics.

Higher Education Graduates

Over 1,000 more students graduated from higher educational institutions in the Lower Savannah area in 2006 than in 1996, an increase of 33%. The greatest numerical increase was in the healthcare field.

Program	1996	2006	Change	% Change
Health professions and related clinical sciences	744	1,143	399	54
Liberal arts and sciences, general studies and humanities	202	330	128	63
Mechanic and repair technologies/technicians	206	320	114	55
Computer and information sciences and support services	131	212	81	62
Family and consumer sciences/human sciences	67	147	80	119
Business, management, marketing, and related support services	586	650	64	11
Multi/interdisciplinary studies	42	102	60	143
Biological and biomedical sciences	58	116	58	100
Engineering technologies/technicians	129	181	52	40
Communication, journalism, and related programs	1	47	46	4,600
Parks, recreation, leisure, and fitness studies		44	44	
Psychology	46	83	37	80
Legal professions and studies	78	109	31	40
Visual and performing arts	12	42	30	250
Theology and religious vocations	4	31	27	675
Philosophy and religious studies	1	3	2	200
Engineering		1	1	
Social sciences and history	97	98	1	1
Physical sciences	19	19	0	0
Public administration and social service professions	93	92	-1	-1
Science technologies/technicians	6	5	-1	-17
English language and literature/letters	49	45	-4	-8
Natural resources and conservation	5	0	-5	-100
Agriculture, agriculture operations, and related sciences	16	4	-12	-75
Mathematics and statistics	39	25	-14	-36
Construction trades	31	12	-19	-61
Precision production	66	45	-21	-32
Security and protective services	161	136	-25	-16
Education	350	246	-104	-30
TOTAL	3,240	4,305	1,065	33

Source: National Center for Education Statistics (Integrated Post Secondary Education System).

Data for these schools: Aiken Technical College, Claflin University, Midlands Technical College, Orangeburg-Calhoun Technical College, South Carolina State University, Southern Methodist College, and USC-Aiken.

OCCUPATIONS

Occupational Projections

The following occupational groups are projected to grow faster in Barnwell County than in the state:

- Computer and mathematical science
- Personal care and service
- Farming and forestry

See **Appendix A** for detailed occupational information.

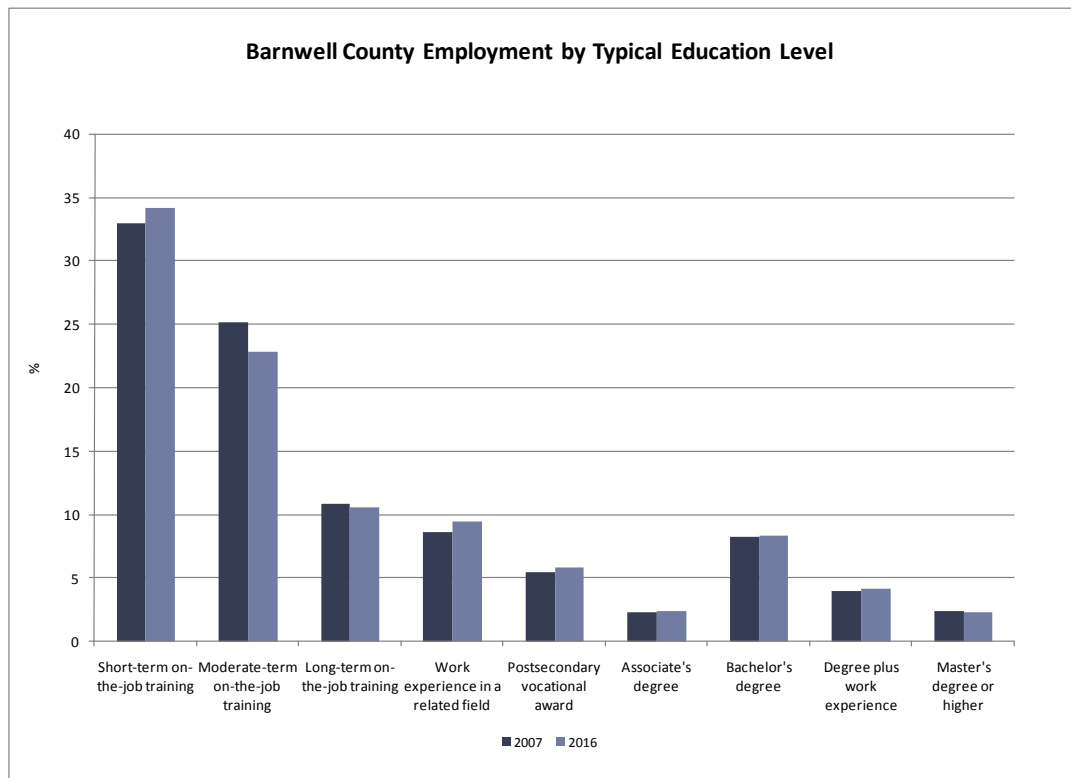
Occupation	2007-2016 Barnwell County Projected Growth (%)	2007-2016 SC Projected Growth (%)
Management occupations	5	17
Business and financial operations occupations	20	22
Computer and mathematical science occupations	24	23
Architecture and engineering occupations	-11%	15
Life, physical and social science occupations	0	15
Community and social services occupations	6	15
Legal occupations	-37%	21
Education, training and library occupations	-5%	16
Arts, design, entertainment, sports and media occupations	4	17
Healthcare practitioners and technical occupations	13	24
Healthcare support occupations	5	25
Protective service occupations	5	18
Food preparation and serving related occupations	4	13
Building and grounds cleaning and maintenance occupations	23	23
Personal care and service occupations	21	7
Sales and related occupations	7	19
Office and administrative support occupations	-8	13
Farming, fishing and forestry occupations	21	16
Construction and extraction occupations	12	19
Installation, maintenance and repair occupations	1	17
Production occupations	-19	10
Transportation and material moving occupations	2	11

Source: Economic Modeling Specialists, Inc.

Occupational Education Requirements

The trend for occupational growth shows that there will be growth in jobs across skill levels. Based on employment projections, Barnwell County is expected to see growth in requirements for the following specific levels of education and experience:

- Short-term on-the-job training
- Work experience in a related field
- Postsecondary vocational award
- Bachelor's degree



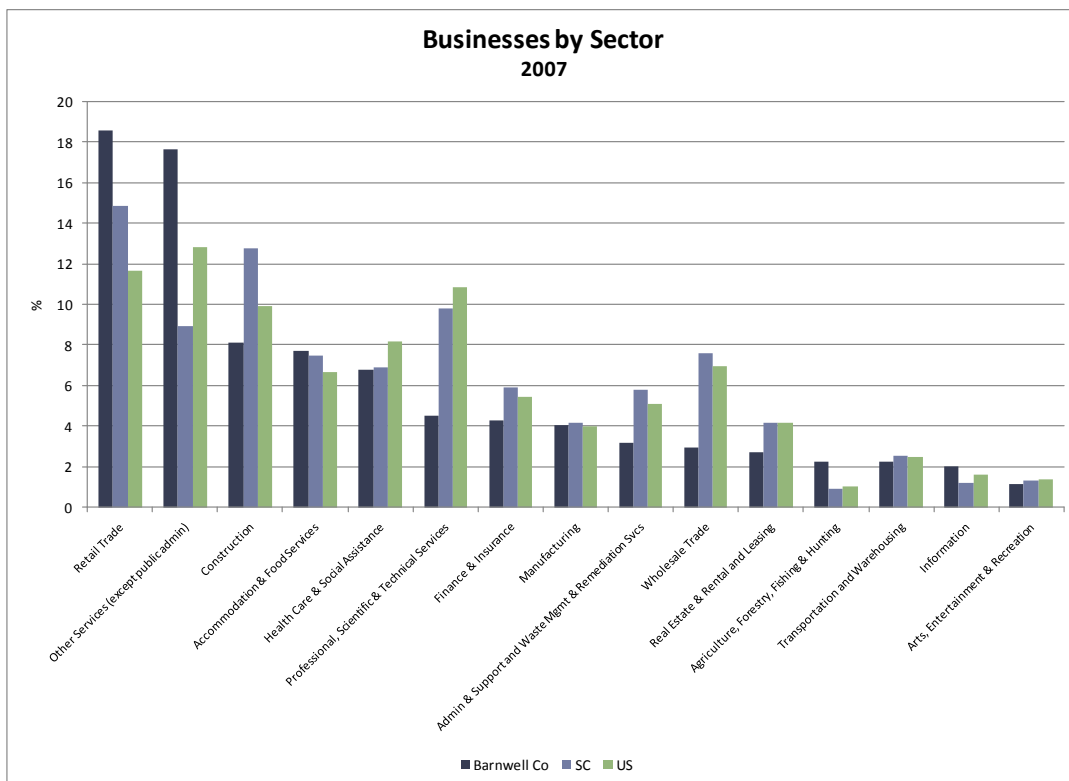
Source: Economic Modeling Specialists, Inc

INDUSTRY

Businesses by Sector

Barnwell County had higher percentages of businesses than South Carolina or the nation in the following sectors:

- Retail trade
- Other services
- Accommodation and food services
- Agriculture and forestry
- Information



Source: U.S. Department of Labor, Bureau of Labor Statistics.

Growth in Number of Businesses

The number of private businesses in Barnwell County fell by 9% from 2002 to 2007, compared to a 2% drop for the state. For industry definitions, this analysis uses the North American Industry Classification System (NAICS), the U.S. standard for industry classification.

At the three-digit NAICS code level, based on available data, Barnwell County had higher growth in five industries compared to South Carolina and the U.S. Below is a list of those five industries along with their respective growth rates.

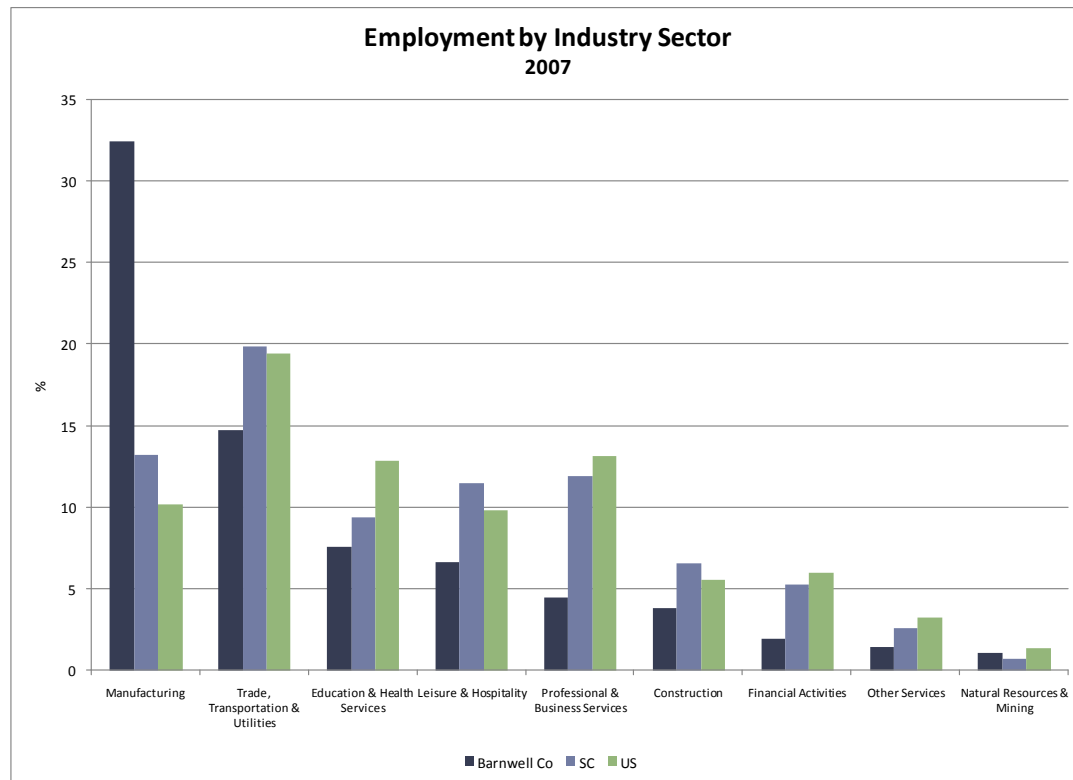
See **Appendix B** for information on all industries.

Industry	2002-2007 Growth (%)		
	Barnwell Co.	SC	US
Forestry and logging	75.0	-26.0	-15.2
Health and personal care stores	14.3	9.1	10.2
Credit intermediation and related activities	50.0	12.2	23.8
Rental and leasing services	50.0	-8.3	1.7
Private households	314.3	4.6	24.9

Source: U.S. Department of Labor, Bureau of Labor Statistics.

Employment by Sector

Barnwell County has a larger than average share of its jobs in manufacturing.



Source: U.S. Department of Labor, Bureau of Labor Statistics.

Industry Analysis

Screening Criteria

Industry sectors were rated on six factors:

- | | |
|------------------------------------|---------------------------------|
| • 2002-2007 employment growth | Competitive effect ¹ |
| • 2002-2007 employment growth rate | Average annual wage |
| • Location quotient ² | Projected growth |

Using those factors, sectors were awarded “stars” based on meeting the following criteria:

- 2002-2007 employment growth of 25 or more (Did the sector add a significant number of jobs?)
- 2002-2007 employment growth rate greater than 0% (the county lost jobs over the period) (Did the sector add jobs?)
- Location quotient of at least 1.25 (Does the sector have a significant concentration in the county?)
- Competitive effect greater than 0 (Did the sector add jobs beyond national growth overall and in the sector?)
- Average annual wage greater than \$29,372 (2007 average for the county) (Does the sector pay wages greater than average for the county?)
- Average or above average projected growth (Is the sector expected to add jobs?)

Data Limitations

Because of Census and Bureau of Labor Statistics restrictions, information on detailed industry sectors is quite limited for smaller counties such as Barnwell. Therefore, this base analysis is not as comprehensive as those for larger areas. Further analysis can be conducted on growth occupations and using other resources in an attempt to obtain more detailed information on potential focus industries for Barnwell County. The Department of Commerce can assist in this supplemental analysis.

Industries of Note

Based on these criteria and available data, there are no “six star” sectors in Barnwell County. The following are “five star” sectors:

- Forestry and logging (the only negative factor being growth of fewer than 25 jobs)
- Health and personal care stores (growth of fewer than 25 jobs)
- Gasoline stations (below-average wages)
- Private households (below-average wages)

Industry sectors that generate wealth from outside the area are referred to as the region’s base economy. Base economy sectors are important to an area’s economic well-being. Of the “five star” sectors above, only forestry and logging meets the base economy criteria.

Appendix C has information on all factors for all sectors for Barnwell County.

¹ *Competitive Effect: based on shift-share analysis; represents the change in employment in the sector in the county after accounting for overall US employment growth and growth/decline in the sector in the US.*

² *Location Quotient: percentage of employment in the sector in the county divided by the percentage of employment in that sector in the US; gives an indication of how concentrated employment in the sector is in the county compared to the US; based on 2007 data.*

MOVING FORWARD

The South Carolina Department of Commerce appreciates the opportunity to provide this base analysis of Barnwell County's labor market. We hope that it will help in advancing the progress of Barnwell County's economic development.

What's been done so far?

This analysis identifies the region's assets—both current and future—at a macro level. Labor Market Information (LMI) at the S.C. Department of Commerce developed a Base Labor Analysis report providing an overview of the region's population, industries, occupations, and educational assets. Additionally, these findings were benchmarked against the state and the nation.

What's next?

Because local knowledge is required to interpret and apply the findings appropriately, the Barnwell Base Labor Analysis should be used with local stakeholders to identify and define key, targeted industry clusters. Some items to consider when defining these clusters may include the following.

1. *What is Barnwell's economic base?*

In order for an economy to grow, it must have a base (export) sector that generates wealth from beyond its borders. Industries in the economic base (manufacturing, scientific and technology services, warehouse and distribution, financial services, regional healthcare, etc.) typically provide occupations with higher pay and benefits as well as better human capital development and promotion opportunities. A successful economic base stimulates the development of the non-base sector (housing, schools, retail, restaurants, personal services, etc.). It also propels the local tax base which, in turn, provides support to community services.

2. *What are strategies to assist low-wage citizens in non-base economy jobs?*

Although the economic base is the driver for long-term growth in a region, implementable strategies for developing job opportunities for low-skilled individuals is a priority for community economic well-being. This need must also be kept in mind when defining target industry clusters.

3. *What other factors are vital to Barnwell and its community?*

Over and above pure economic considerations, what is important to the citizens of the Barnwell community? How does Barnwell want to be perceived? What quality of life issues affect Barnwell? These questions may impact the types of industries desired for the area.

How Labor Market Information at the S.C. Department of Commerce can help.

Once local stakeholders have identified key industry clusters vital to the future economic development of the region, LMI can provide more in-depth analysis of each of these industries, their occupations, business establishments, and educational requirements.

1. Detailed Industry Analysis

For each identified industry, LMI can develop a detailed analysis of each sector, including employment, projected growth, staffing patterns, location quotients, and employers. Additionally, the analysis will examine the largest, fastest growing, and declining sectors within the industry cluster.

2. Detailed Occupational Analysis

At this point, the occupations—classified by SOC codes—that make up each of the identified industry clusters can be analyzed in detail. This analysis will include employment, average earnings, educational requirements, projected growth, and completers from available local training programs. It will culminate in identifying gaps between the number of occupations required to sustain and advance industry growth and the number of skilled workers (as identified by educational requirements and program completers) available to fulfill these positions.

3. Identification of Implementable Recommendations

LMI will utilize the findings of the analyses to develop a set of implementable recommendations. These may include recommendations to align community college programs with economic development goals along with others. Finally, local knowledge will once again be called upon to review the findings and develop an action plan for the implementation of feasible solutions.

Appendix A: Occupational Projections for Barnwell County

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
11-3031	Financial managers	14	14	0	0	0.38	24.64	Degree plus work experience
11-3051	Industrial production managers	15	11	-4	-27	1.87	33.68	Work experience in a related field
11-9011	Farm, ranch, and other agricultural managers	87	95	8	9	3.26	10.95	Degree plus work experience
11-9012	Farmers and ranchers	300	293	-7	-2	3.37	6.55	Long-term on-the-job training
11-9021	Construction managers	41	50	9	22	1.05	10.13	Bachelor's degree
11-9032	Education administrators, elementary and secondary school	26	24	-2	-8	1.68	35.59	Degree plus work experience
11-9051	Food service managers	23	31	8	35	0.97	9.09	Work experience in a related field
11-9111	Medical and health services managers	17	19	2	12	1.02	22.05	Degree plus work experience
11-9141	Property, real estate, and community association managers	25	38	13	52	0.41	7.32	Bachelor's degree
11-9199	Managers, all other	55	70	15	27	0.64	8.89	Work experience in a related field
11-1011	Chief executives	47	56	9	19	0.81	18.44	Degree plus work experience

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
11-1021	General and operations managers	70	63	-7	-10	0.75	30.82	Degree plus work experience
11-1031	Legislators	13	12	-1	-8	4.23	7.32	Degree plus work experience
13-1023	Purchasing agents, except wholesale, retail, and farm products	16	12	-4	-25	1.06	18.31	Work experience in a related field
13-1111	Management analysts	17	24	7	41	0.33	17.12	Degree plus work experience
13-2011	Accountants and auditors	48	62	14	29	0.59	15.23	Bachelor's degree
13-2021	Appraisers and assessors of real estate	13	17	4	31	0.57	8.87	Postsecondary vocational award
13-2052	Personal financial advisors	12	18	6	50	0.32	6.80	Bachelor's degree
13-2072	Loan officers	10	10	0	0	--	--	Bachelor's degree
15-1041	Computer support specialists	17	17	0	0	0.56	11.53	Associate's degree
17-2112	Industrial engineers	27	21	-6	-22	2.57	23.14	Bachelor's degree
17-3026	Industrial engineering technicians	17	12	-5	-29	4.38	14.50	Associate's degree
21-1012	Educational, vocational, and school counselors	16	15	-1	-6	1.16	18.36	Master's degree
21-1021	Child, family, and school social workers	22	21	-1	-5	1.41	11.40	Bachelor's degree
21-1029	Social workers, all other	11	11	0	0	2.76	14.44	Bachelor's degree

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
21-2011	Clergy	25	31	6	24	1.78	6.90	Master's degree
21-2021	Directors, religious activities and education	12	15	3	25	1.81	6.62	Bachelor's degree
23-1011	Lawyers	36	21	-15	-42	0.79	39.65	First professional degree
25-1099	Postsecondary teachers	49	52	3	6	0.59	33.42	Doctoral degree
25-2011	Preschool teachers, except special education	22	22	0	0	0.80	8.14	Postsecondary vocational award
25-2012	Kindergarten teachers, except special education	26	26	0	0	2.63	21.37	Bachelor's degree
25-2021	Elementary school teachers, except special education	160	153	-7	-4	1.88	22.17	Bachelor's degree
25-2022	Middle school teachers, except special and vocational education	46	42	-4	-9	1.26	21.48	Bachelor's degree
25-2031	Secondary school teachers, except special and vocational education	95	84	-11	-12	1.67	24.12	Bachelor's degree
25-2032	Vocational education teachers, secondary school	15	12	-3	-20	2.55	27.37	Degree plus work experience
25-2041	Special education teachers, preschool, kindergarten, and elementary school	15	14	-1	-7	1.23	24.73	Bachelor's degree
25-3021	Self-enrichment education teachers	13	15	2	15	0.90	11.89	Work experience in a related field
25-3099	Teachers and instructors, all other	50	47	-3	-6	1.49	7.60	Bachelor's degree
25-4021	Librarians	11	10	-1	-9	--	--	Master's degree

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
25-4031	Library technicians	15	14	-1	-7	2.36	6.55	Postsecondary vocational award
25-9041	Teacher assistants	92	84	-8	-9	1.27	8.08	Short-term on-the-job training
27-2042	Musicians and singers	12	14	2	17	0.90	7.09	Long-term on-the-job training
29-1051	Pharmacists	17	20	3	18	1.25	50.63	First professional degree
29-1069	Physicians and surgeons	29	28	-1	-3	0.65	37.87	First professional degree
29-1111	Registered nurses	136	147	11	8	1.05	23.00	Associate's degree
29-2011	Medical and clinical laboratory technologists	16	16	0	0	1.90	14.80	Bachelor's degree
29-2041	Emergency medical technicians and paramedics	42	80	38	90	4.09	11.72	Postsecondary vocational award
29-2052	Pharmacy technicians	18	20	2	11	1.14	8.88	Moderate-term on-the-job training
29-2061	Licensed practical and licensed vocational nurses	48	39	-9	-19	1.27	15.39	Postsecondary vocational award
29-2071	Medical records and health information technicians	10	10	0	0	1.21	10.12	Associate's degree
31-1011	Home health aides	18	26	8	44	0.38	7.64	Short-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
31-1012	Nursing aides, orderlies, and attendants	104	95	-9	-9	1.36	8.73	Postsecondary vocational award
31-9091	Dental assistants	10	13	3	30	--	--	Moderate-term on-the-job training
31-9092	Medical assistants	10	10	0	0	--	--	Moderate-term on-the-job training
33-1012	First-line supervisors/managers of police and detectives	10	10	0	0	--	--	Work experience in a related field
33-2011	Fire fighters	17	16	-1	-6	1.12	6.55	Long-term on-the-job training
33-3012	Correctional officers and jailers	26	26	0	0	1.21	11.72	Moderate-term on-the-job training
33-3051	Police and sheriff's patrol officers	51	49	-2	-4	1.65	12.79	Long-term on-the-job training
33-9032	Security guards	10	17	7	70	--	--	Short-term on-the-job training
35-1012	First-line supervisors/managers of food preparation and serving workers	47	54	7	15	1.03	10.12	Work experience in a related field
35-2011	Cooks, fast food	54	57	3	6	1.79	6.55	Short-term on-the-job training
35-2012	Cooks, institution and cafeteria	45	40	-5	-11	2.15	6.55	Moderate-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
35-2014	Cooks, restaurant	25	25	0	0	0.54	7.12	Long-term on-the-job training
35-2015	Cooks, short order	15	16	1	7	1.55	6.55	Short-term on-the-job training
35-2021	Food preparation workers	37	37	0	0	0.78	6.55	Short-term on-the-job training
35-3021	Combined food preparation and serving workers, including fast food	124	137	13	10	0.91	6.55	Short-term on-the-job training
35-3022	Counter attendants, cafeteria, food concession, and coffee shop	37	38	1	3	1.32	6.55	Short-term on-the-job training
35-3031	Waiters and waitresses	48	48	0	0	0.39	6.55	Short-term on-the-job training
35-3041	Food servers, nonrestaurant	11	11	0	0	1.09	7.69	Short-term on-the-job training
35-9011	Dining room and cafeteria attendants and bartender helpers	10	10	0	0	0.48	6.55	Short-term on-the-job training
35-9021	Dishwashers	17	17	0	0	0.64	6.55	Short-term on-the-job training
37-1011	First-line supervisors/managers of housekeeping and janitorial workers	19	20	1	5	0.95	9.36	Work experience in a related field
37-2011	Janitors and cleaners, except maids and housekeeping cleaners	90	90	0	0	0.76	7.80	Short-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
37-2012	Maids and housekeeping cleaners	194	270	76	39	1.75	6.92	Short-term on-the-job training
37-2019	Building cleaning workers, all other	24	28	4	17	0.92	6.55	Short-term on-the-job training
37-3011	Landscaping and groundskeeping workers	45	53	8	18	0.83	7.98	Short-term on-the-job training
39-2021	Nonfarm animal caretakers	14	10	-4	-29	0.72	7.00	Short-term on-the-job training
39-9011	Child care workers	116	159	43	37	1.20	6.64	Short-term on-the-job training
39-9021	Personal and home care aides	37	57	20	54	0.75	6.93	Short-term on-the-job training
41-1011	First-line supervisors/managers of retail sales workers	157	176	19	12	1.32	9.92	Work experience in a related field
41-1012	First-line supervisors/managers of non-retail sales workers	36	46	10	28	0.74	10.49	Work experience in a related field
41-2011	Cashiers, except gaming	307	281	-26	-8	1.64	6.98	Short-term on-the-job training
41-2021	Counter and rental clerks	18	22	4	22	0.75	7.43	Short-term on-the-job training
41-2031	Retail salespersons	245	244	-1	0	0.94	8.44	Short-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
41-3021	Insurance sales agents	13	16	3	23	0.35	12.13	Bachelor's degree
41-3099	Sales representatives, services, all other	12	16	4	33	0.29	11.09	Moderate-term on-the-job training
41-4011	Sales representatives, wholesale and manufacturing, technical and scientific products	12	14	2	17	0.44	15.67	Moderate-term on-the-job training
41-4012	Sales representatives, wholesale and manufacturing, except technical and scientific products	35	34	-1	-3	0.41	11.92	Moderate-term on-the-job training
41-9021	Real estate brokers	42	63	21	50	0.47	7.53	Work experience in a related field
41-9022	Real estate sales agents	44	64	20	45	0.45	7.18	Postsecondary vocational award
41-9091	Door-to-door sales workers, news and street vendors, and related workers	68	80	12	18	1.15	6.56	Short-term on-the-job training
41-9099	Sales and related workers, all other	10	12	2	20	--	--	Moderate-term on-the-job training
43-1011	First-line supervisors/managers of office and administrative support workers	57	54	-3	-5	0.71	16.48	Work experience in a related field
43-3011	Bill and account collectors	11	12	1	9	0.49	11.79	Short-term on-the-job training
43-3021	Billing and posting clerks and machine operators	15	15	0	0	0.54	9.75	Moderate-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
43-3031	Bookkeeping, accounting, and auditing clerks	83	88	5	6	0.70	9.72	Moderate-term on-the-job training
43-3071	Tellers	23	15	-8	-35	0.71	10.49	Short-term on-the-job training
43-4051	Customer service representatives	48	54	6	13	0.40	15.62	Moderate-term on-the-job training
43-4081	Hotel, motel, and resort desk clerks	12	13	1	8	1.02	7.24	Short-term on-the-job training
43-4161	Human resources assistants, except payroll and timekeeping	17	15	-2	-12	1.88	13.20	Short-term on-the-job training
43-4171	Receptionists and information clerks	39	37	-2	-5	0.64	10.40	Short-term on-the-job training
43-5031	Police, fire, and ambulance dispatchers	13	14	1	8	2.48	8.15	Moderate-term on-the-job training
43-5052	Postal service mail carriers	26	22	-4	-15	1.47	19.44	Short-term on-the-job training
43-5061	Production, planning, and expediting clerks	18	15	-3	-17	1.18	13.11	Short-term on-the-job training
43-5071	Shipping, receiving, and traffic clerks	36	30	-6	-17	0.90	10.12	Short-term on-the-job training
43-5081	Stock clerks and order fillers	80	60	-20	-25	0.84	9.05	Short-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
43-6011	Executive secretaries and administrative assistants	74	74	0	0	0.83	8.18	Moderate-term on-the-job training
43-6012	Legal secretaries	47	27	-20	-43	2.48	18.50	Postsecondary vocational award
43-6013	Medical secretaries	26	27	1	4	0.95	8.90	Postsecondary vocational award
43-6014	Secretaries, except legal, medical, and executive	114	103	-11	-10	1.05	10.51	Moderate-term on-the-job training
43-9061	Office clerks, general	106	107	1	1	0.64	8.67	Short-term on-the-job training
45-2092	Farmworkers and laborers, crop, nursery, and greenhouse	76	93	17	22	2.11	6.64	Short-term on-the-job training
45-3011	Fishers and related fishing workers	11	17	6	55	2.07	6.55	Moderate-term on-the-job training
45-4022	Logging equipment operators	10	11	1	10	--	--	Moderate-term on-the-job training
47-1011	First-line supervisors/managers of construction trades and extraction workers	56	67	11	20	0.99	12.75	Work experience in a related field
47-2031	Carpenters	73	87	14	19	0.81	9.78	Long-term on-the-job training
47-2061	Construction laborers	64	78	14	22	0.84	8.28	Moderate-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
47-2073	Operating engineers and other construction equipment operators	33	39	6	18	1.42	14.37	Moderate-term on-the-job training
47-2111	Electricians	49	51	2	4	1.24	13.87	Long-term on-the-job training
47-2141	Painters, construction and maintenance	21	26	5	24	0.71	9.31	Moderate-term on-the-job training
47-2152	Plumbers, pipefitters, and steamfitters	14	15	1	7	0.56	10.12	Long-term on-the-job training
47-2181	Roofers	11	13	2	18	1.15	8.74	Moderate-term on-the-job training
47-2211	Sheet metal workers	74	70	-4	-5	7.93	11.78	Long-term on-the-job training
47-3013	Helpers, electricians	15	15	0	0	2.85	8.75	Short-term on-the-job training
47-4051	Highway maintenance workers	11	10	-1	-9	1.48	10.80	Moderate-term on-the-job training
49-1011	First-line supervisors/managers of mechanics, installers, and repairers	30	30	0	0	1.25	22.03	Work experience in a related field
49-3023	Automotive service technicians and mechanics	44	49	5	11	1.00	9.72	Postsecondary vocational award
49-3031	Bus and truck mechanics and diesel engine specialists	14	14	0	0	0.97	11.34	Postsecondary vocational award

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
49-9021	Heating, air conditioning, and refrigeration mechanics and installers	24	24	0	0	1.34	13.38	Long-term on-the-job training
49-9041	Industrial machinery mechanics	54	53	-1	-2	3.81	12.70	Long-term on-the-job training
49-9042	Maintenance and repair workers, general	119	111	-8	-7	1.63	12.90	Moderate-term on-the-job training
51-1011	First-line supervisors/managers of production and operating workers	82	66	-16	-20	2.26	19.06	Work experience in a related field
51-2022	Electrical and electronic equipment assemblers	28	12	-16	-57	2.51	11.15	Short-term on-the-job training
51-2092	Team assemblers	510	406	-104	-20	8.43	10.38	Moderate-term on-the-job training
51-2099	Assemblers and fabricators, all other	18	13	-5	-28	1.09	7.41	Moderate-term on-the-job training
51-4011	Computer-controlled machine tool operators, metal and plastic	14	11	-3	-21	1.90	13.44	Moderate-term on-the-job training
51-4021	Extruding and drawing machine setters, operators, and tenders, metal and plastic	30	36	6	20	6.18	17.19	Moderate-term on-the-job training
51-4023	Rolling machine setters, operators, and tenders, metal and plastic	12	14	2	17	6.05	28.37	Moderate-term on-the-job training
51-4031	Cutting, punching, and press machine setters, operators, and tenders, metal and plastic	79	66	-13	-16	6.08	12.78	Moderate-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
51-4072	Molding, coremaking, and casting machine setters, operators, and tenders, metal and plastic	16	16	0	0	2.14	12.22	Moderate-term on-the-job training
51-4121	Welders, cutters, solderers, and brazers	26	23	-3	-12	1.20	17.35	Long-term on-the-job training
51-5023	Printing machine operators	11	10	-1	-9	0.99	10.94	Moderate-term on-the-job training
51-6011	Laundry and dry-cleaning workers	11	11	0	0	0.78	8.73	Moderate-term on-the-job training
51-6021	Pressers, textile, garment, and related materials	38	33	-5	-13	10.13	11.53	Short-term on-the-job training
51-6031	Sewing machine operators	59	47	-12	-20	5.05	8.78	Moderate-term on-the-job training
51-6061	Textile bleaching and dyeing machine operators and tenders	26	23	-3	-12	24.80	10.49	Moderate-term on-the-job training
51-6063	Textile knitting and weaving machine setters, operators, and tenders	114	91	-23	-20	61.01	12.09	Long-term on-the-job training
51-9061	Inspectors, testers, sorters, samplers, and weighers	58	43	-15	-26	2.33	10.54	Moderate-term on-the-job training
51-9111	Packaging and filling machine operators and tenders	18	16	-2	-11	0.93	9.47	Short-term on-the-job training
51-9121	Coating, painting, and spraying machine setters, operators, and tenders	45	28	-17	-38	8.15	11.20	Moderate-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
51-9197	Tire builders	109	64	-45	-41	97.00	14.61	Moderate-term on-the-job training
51-9198	Helpers--Production workers	25	24	-1	-4	0.95	9.19	Short-term on-the-job training
53-3022	Bus drivers, school	35	32	-3	-9	1.42	7.62	Short-term on-the-job training
53-3031	Driver/sales workers	34	41	7	21	1.06	6.74	Short-term on-the-job training
53-3032	Truck drivers, heavy and tractor-trailer	124	130	6	5	1.23	9.87	Moderate-term on-the-job training
53-3033	Truck drivers, light or delivery services	70	79	9	13	1.16	6.89	Short-term on-the-job training
53-7051	Industrial truck and tractor operators	29	25	-4	-14	0.87	11.52	Short-term on-the-job training
53-7062	Laborers and freight, stock, and material movers, hand	94	93	-1	-1	0.75	7.42	Short-term on-the-job training
53-7064	Packers and packagers, hand	46	38	-8	-17	1.10	6.55	Short-term on-the-job training
53-7081	Refuse and recyclable material collectors	14	10	-4	-29	1.82	7.06	Short-term on-the-job training
		9,187	9,234	47	1		12.01	

at least
1.25 greater than \$12.01

Source: EMSI

Appendix B: Businesses by 3-Digit NAICS Codes

Barnwell County								
Industry	NAICS Code	2002	2007	Average Size	Change		SC % change	US % change
					#	%		
Forestry and Logging	113	4	7	3	3	75.0	-26.0	-15.2
Support Activities for Agriculture and Forestry	115	4	2	0	-2	-50.0	-13.0	1.8
Specialty Trade Contractors	238	33	25	6	-8	-24.2	-6.4	12.9
Merchant Wholesalers, Nondurable Goods	424	5	4	13	-1	-20.0	-5.0	-3.5
Motor Vehicle and Parts Dealers	441	15	10	7	-5	-33.3	-11.6	2.2
Building Material and Garden Equipment and Supplies Dealers	444	15	11	5	-4	-26.7	-8.8	0.9
Food and Beverage Stores	445	17	13	13	-4	-23.5	-18.2	-0.5
Health and Personal Care Stores	446	7	8	8	1	14.3	9.1	10.2
Gasoline Stations	447	12	12	10	0	0.0	-2.8	-1.9
Clothing and Clothing Accessories Stores	448	7	6	7	-1	-14.3	-5.3	4.6
Sporting Goods, Hobby, Book, and Music Stores	451	3	2	0	-1	-33.3	-11.1	-6.5
General Merchandise Stores	452	10	7	34	-3	-30.0	17.5	13.3
Miscellaneous Store Retailers	453	9	7	4	-2	-22.2	-23.9	-8.6
Telecommunications	517	6	6	9	0	0.0	0.0	9.3
Credit Intermediation and Related Activities	522	10	15	5	5	50.0	12.2	23.8
Real Estate	531	8	6	2	-2	-25.0	18.8	23.8
Rental and Leasing Services	532	4	6	4	2	50.0	-8.3	1.7
Professional, Scientific, and Technical Services	541	25	20	8	-5	-20.0	2.1	14.3
Ambulatory Health Care Services	621	24	19	7	-5	-20.8	7.4	13.3
Social Assistance	624	10	6	5	-4	-40.0	-5.0	29.4
Accommodation	721	6	5	10	-1	-16.7	-3.4	3.5
Food Services and Drinking Places	722	38	29	13	-9	-23.7	-0.2	12.2
Repair and Maintenance	811	19	12	3	-7	-36.8	-18.3	-0.4
Personal and Laundry Services	812	10	6	0	-4	-40.0	-2.4	7.2
Religious, Grantmaking, Civic, Professional, and Similar Organizations	813	3	3	0	0	0.0	-2.0	3.3
Private Households	814	14	58	1	44	314.3	4.6	24.9

growth rate exceeds both SC and US growth rates

Source: Bureau of Labor Statistics

Appendix C: Barnwell County Employment by Industry Sector

Industry	NAICS code	Employment		2002-2007 Change		Location Quotient	Competitive Effect	2007 Average Annual Wage (\$)	Projected Growth
		2002	2007	#	%				
Total		7,977	6,655	-1,322	-16.6			29,372	1%

6 star sectors									
Industry	NAICS code	Employment		2002-2007 Change		Location Quotient	Competitive Effect	2007 Average Annual Wage (\$)	Projected Growth
		2002	2007	#	%				
NONE									

5 star sectors									
Industry	NAICS code	Employment		2002-2007 Change		Location Quotient	Competitive Effect	2007 Average Annual Wage (\$)	Projected Growth
		2002	2007	#	%				
Forestry and Logging	113	13	24	11	85	8.33	13	35,746	A
Health and Personal Care Stores	446	56	61	5	9	1.40	1	31,514	AA
Gasoline Stations	447	57	123	66	116	3.25	68	12,563	AA
Private Households	814	12	48	36	300	1.99	33	9,607	A

4 star sectors		Employment		2002-2007 Change		Location Quotient	Competitive Effect	2007 Average Annual Wage (\$)	Projected Growth
Industry	NAICS code	2002	2007	#	%				
Clothing and Clothing Accessories Stores	448	9	42	33	367	0.64	32	15,243	AA
Credit Intermediation and Related Activities	522	60	80	20	33	0.64	16	32,356	A
Accommodation	721	15	48	33	220	0.59	32	10,517	AA

3 star or fewer sectors		Employment		2002-2007 Change		Location Quotient	Competitive Effect	2007 Average Annual Wage (\$)	Projected Growth
Industry	NAICS code	2002	2007	#	%				
Merchant Wholesalers, Nondurable Goods	424	28	52	24	86	0.58	23	23,693	AA
Rental and Leasing Services	532	15	24	9	60	0.87	9	16,433	AA
Specialty Trade Contractors	238	131	144	13	10	0.68	-6	28,143	AA
Building Material and Garden Equipment and Supplies Dealers	444	47	50	3	6	0.86	-2	19,964	A
General Merchandise Stores	452	280	235	-45	-16	1.76	-66	20,053	A
Telecommunications	517	85	54	-31	-36	1.19	-21	69,336	AA
Professional, Scientific, and Technical Services	541	535	169	-366	-68	0.50	-444	63,790	AA
Ambulatory Health Care Services	621	167	142	-25	-15	0.59	-55	36,989	AA
Motor Vehicle and Parts Dealers	441	75	73	-2	-3	0.87	-3	25,797	AA
Food and Beverage Stores	445	191	171	-20	-10	1.37	-18	13,370	D
Real Estate	531	17	11	-6	-35	0.17	-8	16,881	AA
Social Assistance	624	43	30	-13	-30	0.30	-21	10,164	AA
Food Services and Drinking Places	722	378	369	-9	-2	0.88	-58	9,726	AA
Repair and Maintenance	811	33	31	-2	-6	0.57	-2	21,237	AA
Miscellaneous Store Retailers	453	37	28	-9	-24	0.73	-5	19,410	D

Methodology and Sourcing

Projected Growth Grading Scale:

AA=above average

A=average

BA=below average

D=decline

Sectors are rated on 6 factors: 2002-2007 employment growth, 2002-2007 employment growth rate, location quotient, competitive effect, average annual wage, and projected growth.

Stars are based on: 2002-2007 employment growth of 25 or more, 2002-2007 employment growth rate greater than 0 (since overall county job growth was negative), location quotient of at least 1.25, competitive effect greater than 0, average annual wage greater than \$29,372 (2007 average for all jobs in the county), and average or above average projected growth.

Location Quotient: percentage of employment in the sector in the county divided by the percentage of employment in that sector in the US; gives an indication of how concentrated employment in the sector is in the county; based on 2007 data.

Competitive Effect: based on shift-share analysis; represents the change in employment in the sector in the county after accounting for overall US employment growth and growth/decline in the sector in the US.

Source: Bureau of Labor Statistics; projections based on data from EMSI and SC Department of Commerce.



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